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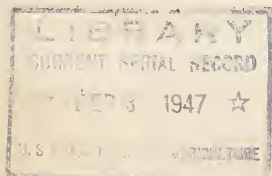
Reduced Wheat Exports From Australia in Prospect in View of Small 1946 Crop,
Which Was Cut Sharply by Drought (Page 46)

Despite Sharp Rise Expected in Edible Olive-Oil Production for 1946-47 in the
Mediterranean Countries, Exportable Supplies Will Be Limited (Page 45)

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UNITED STATES DEPARTMENT OF AGRICULTURE, WASHINGTON, D.C.

L A T E N E W S

The second official forecast places India's 1946-47 cotton acreage at 12,727,000 acres, compared with a second estimate of 12,583,000 acres for 1945-46 and a final (unrevised) 1945-46 estimate of 14,480,000 acres. During the past 10 years the second acreage estimates have averaged 83.6 percent of the final estimates. The 1946 estimate is divided as follows: Bengals 1,390,000 acres, Americans 2,996,000, Comras 4,149,000, Breach 445,000, Surti 302,000, Dholleras 786,000, and others 2,659,000.

Hog cholera epidemic in many parts of Colombia is reported to be taking a constantly increasing toll of hogs. Losses have reached epidemic proportions in the Tolima area. Veterinarians are vaccinating as many of the unaffected herds as possible. Quantities of serum are being despatched to the most seriously affected areas and it is understood that substantial orders for serum are being placed in the United States.

Italy's import requirements for 1946-47 are expected to be substantially larger than in prewar, with a 3.6-million rise in population and less domestic food supplies available. Importation of 1,800 thousand gross tons of foodstuffs, now forecast as reasonable, would represent 16.5 percent of the caloric value of the total consumption forecast for 1946-47--double the prewar figure.

Spain has agreed to ship its total 1947 bitter-orange crop to Great Britain for the manufacture of marmalade. About 250,000 boxes of 100 pounds each are expected to be shipped.

India has announced an export duty of 2 annas (about 3.7 cents) per pound on tea, effective January 16.

Belgian winter wheat plantings are down from last year, with some damage reported from freezing. A substantial decline is indicated for pig and poultry numbers.

Uruguay is reported to have concluded a 6-year purchase agreement with Brazil, giving preference to that country's cotton textiles and agreeing to buy an unspecified quantity at prices at least equal to those quoted from other sources. The arrangement is similar to an agreement already entered into by Brazil with Argentina and Chile. Brazil in turn would take Uruguayan fruits and a small quantity of wool.

A new French-Italian commercial agreement, which anticipates an increased volume of trade between the two countries, would have Italy export raw silk, hemp, essential oils, and fruits and vegetables, while France and its overseas territory would export fertilizers and metals, and other products, according to press accounts.

MEDITERRANEAN BASIN OLIVE-OIL OUTPUT NEAR AVERAGE ^{1/}

Edible olive-oil production in the principal producing countries of the Mediterranean Basin for 1946-47 is expected to be considerably larger than in the past two seasons. Only limited exportable supplies, however, are expected to be available this year. The 1946-47 preliminary estimate is indicated at 877,700 short tons, compared with 539,200 tons (revised) in 1945-46 and the 10-year (1934-35/1943-44) average of 912,700 tons. This year's estimate shows considerable increases for Spain, Algeria, French Morocco, Italy, Portugal, and Tunisia, but declines for France, Greece, Libya, Palestine, and Syria-Lebanon. The very small output of Spain, Italy, and North African countries last season was responsible for the smallest total output in recent years for the Mediterranean Basin.

EDIBLE OLIVE OIL: Estimated production in the Mediterranean Basin (Revised)
(Rounded to nearest 100 short tons)

Country	Average		1943-44	1944-45	1945-46 ^{a/}	1946-47 ^{b/}
	1934-35	1939-40				
	through	through				
	1943-44	1943-44				
	Short	Short	Short	Short	Short	Short
	tons	tons	tons	tons	tons	tons
France	8,400	7,100	4,400	9,000	5,500	2,200
Greece	106,700	101,600	88,900	67,100	107,000	100,000
Italy	220,300	217,500	197,000	264,400	110,000	165,000
Portugal	58,700	65,900	90,000	44,000	43,600	51,900
Spain	385,800	338,400	440,000	242,000	176,000	440,000
Palestine ...	7,300	8,000	10,900	3,000	13,000	1,300
Syria and						
Lebanon ...	13,400	12,500	11,800	11,900	23,000	10,100
Turkey	32,300	35,200	27,500	26,400	35,200	40,700
Algeria	17,100	18,900	20,900	16,500	8,800	22,000
French						
Morocco ...	11,600	13,300	9,900	7,600	5,500	16,500
Tunisia	44,700	43,000	38,500	82,500	6,600	22,000
Other						
countries ..	6,400	5,800	4,900	3,700	5,000	6,000
Total ..	912,700	867,200	944,700	778,100	539,200	877,700

Compiled from trade and official sources.

^{a/} Preliminary estimate. ^{b/} Preliminary forecast.

Growing conditions in Spain, North Africa, and Turkey were in general considerably more favorable this season than in last. In most of the other countries, notably Italy, early season conditions were very much better than during 1945-46. The prolonged drought of last summer, however, brought about a heavy drop and fruit failed to size normally, thereby reducing the output

(Continued on page 57)

^{1/} A more extensive statement on this subject may be obtained from the Office of Foreign Agricultural Relations.

C O M M O D I T Y D E V E L O P M E N T S

GRAINS, GRAIN PRODUCTS, AND FEEDS^{1/}AUSTRALIA'S WHEAT
CROP CUT BY DROUGHT

The 1946 wheat outturn in Australia is placed at about 115 million bushels, on the basis of the latest information available, representing a considerable drop from the earlier forecast of 160 million bushels. This compares with 142 million bushels in 1945 and the average of 150 million bushels. The decline was due to a virtual crop failure in the ranking wheat producing State of New South Wales, where production was the smallest since 1920. The total harvest for other important wheat areas, in contrast, was above average. Below-average exports are in prospect in view of the small 1946 crop.

The acreage seeded to wheat was about 1.5 million acres larger than in 1945. Weather conditions up to the end of August were favorable to the development of the crop in all areas except northern New South Wales and Queensland. In those areas, however, abnormally dry weather in September and October caused serious deterioration, which was too far advanced to be checked by November rains in most parts of the wheat belt.

In New South Wales, northern areas were showing severe drought damage at the end of August, but the crop in the southern part of the State was reported in good condition. Continued dry weather through September and October, however, caused deterioration in southern areas, reducing prospective yields by about 50 percent. A minimum of 14 million bushels will be required from Victoria and South Australia to fill requirements in this normally surplus area.

In contrast with the virtual failure in New South Wales, Victoria's production was above average and the largest reported since 1941. Dry conditions during September and October caused some deterioration, especially in northern sections, but mid-November rains benefited late-sown wheat.

Good early season prospects in South Australia were reduced by dry, cold weather during September. Severe frosts were reported at that time. Conditions during October were more favorable, but rust damage was reported in a number of districts. Unfavorable weather in November contributed further to the rust damage. The estimated production is only about 70 percent of the earlier prospects, though still about average, and the quality of the grain is said to be disappointing.

^{1/} This section is continued on page 60.

The crop in Western Australia was somewhat below average despite a substantial increase in the area seeded, compared with recent years. Damage is attributed both to early season floods in some districts and to dry conditions later in the growing season.

AUSTRALIA: Wheat acreage sown and production, 1946
with comparisons

State	Average 1934-43	1944	1945	1946 a/
	1,000	1,000	1,000	1,000
	acres	acres	acres	acres
Acreage sown				
New South Wales ..	3,937	2,845	3,774	4,265
Victoria	2,481	2,142	3,251	3,400
South Australia ..	2,664	1,623	2,165	2,550
Western Australia:	2,589	1,516	1,836	2,400
Queensland	315	332	393	b/
Tasmania	11	4	5	b/
Capital Territory:	2	1	2	b/
	11,999	8,463	11,426	c/13,000
	1,000	1,000	1,000	1,000
	bushels	bushels	bushels	bushels
Production				
New South Wales ..	51,635	17,134	62,520	14,500
Victoria	33,959	3,498	29,634	45,000
South Australia ..	30,954	9,244	21,034	32,000
Western Australia:	28,149	13,929	20,929	21,000
Queensland	4,677	6,981	8,188	400
Tasmania	238	92	67	b/
Capital Territory:	38	2	38	b/
Total	149,650	52,880	142,410	c/113,000

From official and unofficial sources.

a/ Unofficial estimates for production. b/ Not available. c/ Includes an allowance for missing data.

Conditions in Queensland were, like northern New South Wales, dry throughout most of the growing period. As a result of the unfavorable weather, the crop is estimated to be a virtual failure, being less than 10 percent of average, and a requirement of 10 million bushels in addition to the small crop is reported. A transportation shortage is expected to be the chief difficulty in moving that amount of wheat from other States into Queensland.

Because of the almost complete failure of the crop in Queensland and the greatly reduced production in New South Wales, the Commonwealth Government has directed the Australian Wheat Board to supply up to 20 million bushels of wheat to these two States with freight charges to be met by the Commonwealth Government.

During November the Commonwealth Government passed legislation to provide drought relief to grain growers in New South Wales, Victoria, and South Australia. Growers who suffered drought losses during 1944 or 1945 will be granted relief, from funds contributed equally by the Commonwealth and State Governments.

Total supplies of wheat for use in the year beginning December 1, 1946, are placed at from 130 to 135 million bushels. About 20 million bushels are expected to remain on farms for seed and feed, and an additional allowance of 60-65 million bushels for domestic use leaves about 50 million bushels for export during the year and for carry-over at the end of the year.

Exports of wheat and flour during the season ended December 1, 1946, were about 57 million bushels in wheat equivalent. India and New Zealand were the principal destinations for wheat, while the principal countries receiving Australian flour were Ceylon, Malaya, and India.

The Australian Wheat Board's price for export wheat was advanced by 1s 6d per bushel (24 cents) as of November 23. This brings the price to 13s 5-1/4d (\$2.15) f.o.b. terminal shipping point, bulk basis. That rate applies to exports of flour or manufactured products in wheat equivalent, as well as to wheat.

INDIA'S WHEAT CROP SMALLEST SINCE 1929

India's final estimate of the 1946 wheat crop places the outturn at 332,379,000 bushels, the smallest reported since 1929, compared with the revised figure of 393,904,000 bushels for the preceding year. The poor returns were due to reduced acreage and below-average yields, attributed to failure of the winter rains.

The wheat area, as reported at 34,559,000 acres was about 1.4 million acres smaller than the final 1945 estimate. Average yields per acre were 9.6 bushels in 1946, compared with 10.9 in 1945.

CUBAN RICE IMPORTS BELOW 1945 LEVEL

Rice arrivals into Cuba from August to December of the current marketing year were 126 million pounds, or 36 percent below 197 million during the same period of 1945, according to ships' manifests. For the first time in several months, however, imports of 55 million pounds during December were up to normal.

Even though December imports exceeded the average monthly consumption of 43 million pounds, current low stocks and prospects for reduced imports are causing some apprehension in Cuba lest supplies during the sugar-grinding season may be inadequate for needs. Ninety-nine percent of the December imports came from the United States.

FATS AND OILS

ARGENTINE OLEAGINOUS

EXPORTS BELOW PREWAR 1/

Exports of Argentina's four major oil-producing seeds; namely, flaxseed, rapeseed, sunflower seed, and peanuts, during January-October 1946 were less than one-third of the quantity exported in the same months of 1945, and only 4 percent of the 1935-39 average shipments of 1,683,800 short tons. By contrast, exports of the corresponding oils rose from less than 1,000 tons in the prewar years to approximately 170,000 in the first 10 months of 1946. Flaxseed and linseed oil accounted for 66 and 68 percent, respectively, of last year's shipments, while in the late 1930's flaxseed alone represented 98 percent.

ARGENTINA: Exports of specified vegetable oilseeds and oils,
1946 with comparisons

Vegetable oil- seeds and oils	: Average : : 1935-39 :	: 1943 :	: 1944 :	: 1945 :	: January-October	
					: 1945 :	: 1946 :
	: 1,000 :	: 1,000 :	: 1,000 :	: 1,000 :	: 1,000 :	: 1,000 :
	: short :	: short :	: short :	: short :	: short :	: short :
	: tons :	: tons :	: tons :	: tons :	: tons :	: tons :
Oilseeds						
Flaxseed	1,657.0:	712.6:	303.3:	148.4:	139.2:	42.9
Rapeseed	17.7:	5.3:	2.6:	0.9:	0.1:a/	0.5
Sunflower seed ..	5.4:	22.2:	40.0:	39.8:	25.9:a/	15.6
Peanuts	3.7:	24.9:	64.3:	56.1:	52.4:a/	7.2
Oils						
Linseed	b/ 0.6:	38.8:	27.8:	51.0:	36.3:	114.8
Rapeseed	- :	92.0:	8.7:	11.3:	2.1:	2.6
Sunflower seed ..	- :	35.9:	54.5:	79.3:	68.6:	44.1
Peanut	c/ 1.5:	0.6:	4.3:	2.9:	8.5	

Compiled from official sources and foreign service reports.

a/ January-June, latest information available. b/ 1937-39 average; if any in earlier years, not separately classified. c/ Negligible.

NETHERLANDS RAPESEED CROP

DOWN; OTHER OILSEEDS UP

The Netherlands' 1946 oilseed crops, with the exception of rapeseed, showed decided increases over those of the past few years. Flaxseed production was estimated at 314,000 bushels, 28 and 5 percent, respectively, greater than the crops of the two preceding years. Increased production was attributed to an acreage expansion (30 percent over 1945) resulting from price stimulus. The past year's output, however, was over 30 percent less than the 1935-44 average.

1/ A more extensive statement on this subject is available upon request to the Office of Foreign Agricultural Relations.

Poppy-seed production of almost 6,200 short tons for 1946 trebled the 1945 crop, and according to available information, appears to have been the largest crop in more than a decade. The cultivated acreage was increased 170 percent over that of 1945.

According to mustard-seed estimates, which are available for the first time since liberation, the 1946 output amounted to nearly 2,600 tons from approximately 5,400 acres. This indicates an increase of 800 percent over the 1940-44 average production and 60 percent over the prewar (1935-39) average.

The Netherlands' rapeseed production attained its peak in 1944 when 88,000 tons were realized from 120,000 acres. During the years of German occupation, special efforts were concentrated on the cultivation of this oilseed crop. Acreage reduction started in 1945 and continued into 1946 when the output was only 5,000 tons from 10,000 acres.

THE NETHERLANDS: Oilseed acreage and production,
1946 with comparisons

Year	Rapeseed	Flaxseed	Poppy seed	Mustard seed
Area	Acres	Acres	Acres	Acres
Average -				
1935-39	4,332	42,338	3,015	2,456
1940-44	52,533	43,816	10,724	a/ 751
1944	120,091	28,911	14,826	b/
1945	85,709	23,289	6,012	b/
1946	10,067	30,841	16,160	5,360
Production	Short tons	Bushels	Short tons	Short tons
Average -				
1935-39	4,361	545,851	1,896	1,584
1940-44	40,068	411,433	a/ 2,163	a/ 278
1944	88,393	300,000	5,569	b/
1945	24,883	244,553	1,989	b/
1946	5,378	314,155	6,195	2,595

Compiled from official sources.

a/ Average of less than 5 years. b/ Not available.

ECUADOR'S LARD
SUPPLIES INADEQUATE

Despite the rise in domestic lard production this year and above-average level of imports, Ecuador's lard supplies are short of the present high demand. This has been due, in part, to the fact that prior to the sharp advance in prices, the laboring classes, having more money, purchased more foodstuffs including lard and other fats and oils. Annual consumption is estimated at about 9,000 tons.

Though 12 percent greater than in 1945, Ecuador's lard production of 1,520 short tons for 1946 is 12 percent less than the 1939-43 average output

of 1,730 tons. The yield of lard from hogs fattened on large farms is estimated at about 30 pounds per animal while that of animals produced on small farms is much less.

ECUADOR: Domestic hog-lard production, ^{a/}
1946 with comparisons

Year	Production	Year	Production
	Short tons		Short tons
1939	1,191.9	1943	1,684.6
1940	1,280.6	1944	b/
1941	3,100.3	1945	1,353.8
1942	1,377.6	1946	1,521.2

American Embassy, Guayaquil.

a/ Commercial production. b/ Not reported.

Imports of lard for the first 6 months of 1946 amounted to 4,640 tons, compared with 7,370 tons for the entire year 1945 and the 1940-44 average of 2,710 tons. Prior to 1941 the United States was the principal source of supply, but with the wartime demands on United States supplies and the scarcity of shipping space, Argentina became the most important contributor. Hog lard, amounting to 20 million sucres (\$1,480,000) headed the list of imports in value for the first half of 1946.

ECUADOR: Imports of hog lard,
1946 with comparisons

	Argentina	United States	Uruguay	Others	Total
	Short tons	Short tons	Short tons	Short tons	Short tons
Average -					
1940-44	2,292.0	413.1	-	4.9	2,710.0
1945	7,307.5	14.8	47.7	0.7	7,370.7
1946 a/	-	-	-	-	4,640.9

American Embassy, Guayaquil.

a/ January-June, inclusive. Country breakdown not available.

The current lard shortage is attributed to: (1) greatly reduced number of hogs, (2) loss of animals from cholera on small farms where slaughtering was formerly done for home consumption, (3) greater consumption by laboring classes, (4) greater profit derived from selling corn for human consumption than for feeding its to hogs, (5) diversion of broken rice from hog feed to dairy-cattle feed, (6) illegal sales of domestic lard, and possibly imported lard, to buyers in Peru and Colombia, and (7) utilization, in the manufacture of soap, of some of the domestic vegetable oils formerly used as human food.

Many of the larger land owners are now increasing hog numbers to supply the market with lard. The number that can be raised profitably will depend upon the demand and the price that can be obtained for pork. A plentiful supply of pork but a scarcity of lard in some areas in 1946 was due to the slaughtering of light-weight hogs.

Inadequate transportation facilities have also influenced lard production. More railway cars suitable for transporting livestock are needed on the Ecuadoran Railway to bring animals from the Sierra to Guayaquil.

COTTON AND OTHER FIBERS 1/

PERU'S COTTON EXPORTS TOP PREWAR RATE

Peru's cotton exports during the 5 months ended December 31, 1946, totaled 217,000 bales, (500-pound equivalent), compared with 159,000 for a similar period in 1945. This rate of export movement is nearly 55 percent above the relatively high level of the 5 prewar years. Most of the increase is accounted for by takings of the United Kingdom, the United States (partly for reexport), India, and Italy.

PERU: Cotton exports by countries August-December,
1946 with comparisons
(Bales of 500 pounds gross)

Countries of destination	Year beginning August 1					
	Average :	1943 :	1944 :	1945 :	August-December	
	1934-38 :				1945 :	1946
	1,000	1,000	1,000	1,000	1,000	1,000
	bales	bales	bales	bales	bales	bales
United Kingdom..	:	:	:	:	:	:
United Kingdom..	162.7 :	71.8 :	18.0 :	123.3 :	56.9 :	39.5
Switzerland ....	.0 :	.0 :	21.1 :	42.6 :	16.3 :	9.5
Belgium	15.6 :	.0 :	.0 :	19.6 :	1.2 :	12.1
Netherlands	10.3 :	.0 :	.0 :	11.5 :	.9 :	4.8
France	8.9 :	.0 :	.0 :	17.2 :	.0 :	6.1
Italy	3.3 :	.0 :	.0 :	25.2 :	.0 :	20.6
British India ..	4.7 :	.0 :	.0 :	31.6 :	.8 :	41.6
United States ..	.6 :	4.5 :	16.1 :	46.0 :	24.7 :	34.5
Chile	6.6 :	43.6 :	25.8 :	36.8 :	21.9 :	18.2
Colombia .....	.0 :	4.8 :	19.6 :	30.4 :	14.9 :	19.9
Cuba .....	.0 :	6.0 :	9.1 :	5.6 :	.4 :	2.4
Ecuador .....	.0 :	4.4 :	2.1 :	4.9 :	2.2 :	.7
China .....	.2 :	.0 :	.0 :	2.2 :	.0 :	.0
Germany	94.5 :	.0 :	.0 :	.0 :	.0 :	.0
Japan	26.5 :	.0 :	.0 :	.0 :	.0 :	.0
Venezuela .....	.0 :	.0 :	13.4 :	7.3 :	7.1 :	.9
Sweden	a/ :	.7 :	2.8 :	4.5 :	2.5 :	.5
Bolivia .....	.5 :	5.5 :	5.8 :	3.4 :	3.0 :	1.1
Other countries:	2.5 :	11.7 :	22.7 :	11.2 :	5.9 :	4.8
Total	336.9 :	153.0 :	156.5 :	424.3 :	158.7 :	217.2
	:	:	:	:	:	:

Compiled from reports by the Peruvian Cotton Chamber and the Statistical Department of the Callao Customhouse. Data for 1939-42 are published in Foreign Crops and Markets, March 25, 1946.

a/ Less than 50 bales.

1/ The table of weekly cotton prices appears on page 58.

Sales during January-October from the 1946 crop were equivalent to 297,000 bales, or about 93 percent of the estimated crop. The Tanguis variety represented 87.2 percent of the total sales and Pima, 12.7 percent.

The heavy export movement has reduced Peru's stocks to the lowest level since 1941. Port stocks on hand December 6, 1946, were reported at 94,000 bales, compared with 387,000 bales a year ago. Stocks at mills, gins, and farm usually range from a total of 30,000 to 45,000 bales at that time of the year. Further reductions may be expected in port stocks as the seasonal low point is usually reached just before the heavy movement of new-crop cotton begins early in May.

The 1946 crop in areas north of Lima was reported as very satisfactory but the high yields were more than offset by reductions in the southern Provinces, where weather conditions were unfavorable during the flowering period. The entire 1946 (1945-46) crop in Peru was not expected to equal the 1945 crop of 325,000 bales.

Prices of Tanguis reached a peak level during the last half of August 1946, equivalent to 28.8 cents per pound for Type 5, then fluctuated around 28 cents until early November. There has been no sustained recovery since the price dropped to 24.6 cents during the first 10 days in November and on January 18, 1947, the closing quotation was equivalent to 24.0 cents.

Prices of all Pima cotton sold in Peru during August averaged nearly 30 cents a pound, a record level for recent years. The average was equivalent to 28.72 cents for September and 28.0 cents for October. The disparity between prices of Pima and Tanguis narrowed to less than one cent during the period of highest prices but again widened to 2.0 to 2.5 cents after the sharp decline in prices of Tanguis early in November.

FRUITS, VEGETABLES, AND NUTS

SPAIN'S ORANGE CROP SEEN BELOW AVERAGE

Spain's orange crop is now estimated at 14.2 million boxes, 13 percent above the 1945-46 crop of 12.6 million boxes, but only about half the pre-war production. Freezing temperatures in January 1946 completely destroyed many groves, and an abnormally wet and cold spring followed the freeze so that flowering of orange trees was not normal. Abrupt changes in temperature in some areas caused trees to flower two or three times. Shortage of fertilizers has not only had an effect on the size of the crop but has probably caused more fruit to fall than usual.

SYRIA-LEBANON CITRUS PRODUCTION DECLINES

Orange production in Syria for the 1946 season is now estimated at around 50,000 boxes, 30 percent below the 1945 crop of 70,000 boxes.

The lemon crop is indicated to be 6,600 boxes, compared with 9,400 boxes in last year. The decrease is due to destruction of blossoms by strong winds and to lack of moisture in early winter. Orange production in Lebanon for the 1946-47 season is estimated at 1,211,000 boxes, 22 percent below the 1,553,000 boxes produced during 1945-46. Lemons for the current season are estimated at 435,000 boxes, 40 percent below the 725,000 boxes produced during the previous year. This reduction in the citrus crop is due principally to severe hail storms during the blossoming period in March. In addition, citrus groves have suffered from black scale and silver mites, which have increased in 1946.

CUBAN VEGETABLE SHIPMENTS HIGHER

Fresh vegetable shipments from Cuba to the United States for November and December 1946 amounted to 5.1 million pounds, about twice the shipments for the same period last year but a little less than half the 1938-40 shipment. Tomatoes made up the bulk of the shipment, amounting to 4.2 million pounds, compared with 2.1 the previous year and 8.3 for the 3-year (1938-40) average. Frozen lima beans, of 500,000 pounds were seven times more than shipments in November-December of last year.

CUBA: Fresh vegetable shipments from Habana to the United States,
November-December 1946 with comparisons

Vegetable	1938-40	1945	1946
	1,000	1,000	1,000
	<u>pounds</u>	<u>pounds</u>	<u>pounds</u>
Tomatoes	8,337	2,118	4,225
Eggplant	745	6	5
Peppers	109	261	a/
Okra	520	33	78
Lima beans, frozen	0	74	502
Cucumbers	1,080	41	55
Others	b/ 1,647	145	250
Total	12,438	2,678	5,115

Compiled from official sources

a/ Less than 500 pounds. b/ Includes 1,423,000 pounds of fresh limas in pod.

MEXICAN VEGETABLE SHIPMENTS LARGER

Fresh vegetable shipments from Mexico for the current season amounted to 25.3 million pounds, about a million pounds more than for the same period last season but 10 million pounds less than during the season ended December 1944. Of this total of 25.3 million pounds, tomatoes amounted to 22.8

million, 1 million more than in the preceding season but 11 million less than for 1944. Green pepper shipments for the current season were about the same as for the same period last year.

MEXICO: Fresh vegetable shipments to the United States from the west coast of Mexico, season through December 1946, with comparisons

Vegetable	1944	1945	1946
	1,000 pounds	1,000 pounds	1,000 pounds
Tomatoes	33,844	21,859	22,798
Peppers, green	1,198	2,413	2,407
Peas, green	186	112	43
Mixed	10	109	64
Total	32,238	24,493	25,312

Compiled from official sources.

LIVESTOCK AND ANIMAL PRODUCTS 1/

BRAZIL APPROVES PLAN FOR 1947 MEAT SUPPLY

Brazil's Minister of Agriculture recently approved the "Meat Supply Plan for 1947", which was promulgated by the Department of Animal Production of that Ministry. This plan covers production of meat and byproducts in the East (Federal District and States of Minas Gerais, Rio de Janeiro, and Espirito Santo), South (States of Santa Catarina, Parana, and Sao Paulo) and West Central (States of Matto Grosso and Goyaz).

The general plan envisages a continuation of meat distribution in the district mentioned during 3 days per week and stipulates that killing of bovine cattle for the preparation of products for international trade also remains prohibited, in accordance with existing legislation. The State of Rio Grande do Sul is not subject to the general plan and the Sul-Riograndense Meat Institute is charged with establishing quotas, etc., for that State.

U. S. CATTLE IMPORTS FROM MEXICO RISE

Stocker and feeder cattle passed for entry from Mexico, into this country amounted to 92,888 head in December, the largest movement for that month in recent years. The total number of such cattle from Mexico entered during 1946 was 432,447 head, an increase of 2 percent over 1945. Although last summer's United States border quarantine had the effect of completely excluding these and other Mexican cattle from June 5 to October 18, 1946, it occurred during a period when cattle movement was seasonably light. Heavy spring and fall shipments, however, enabled Mexican cattlemen to export almost the limit of the quota permitted by the Mexican Government.

1/ This section is continued on page 59.

On December 27, 1946, following the outbreak of foot-and-mouth disease near Puebla and Vera Cruz, the border was closed to cattle as required by law, suspending for an indefinite period further importations of feeder cattle from this source.

UNITED STATES: Cattle passed for entry from Mexico for feeding or slaughter, 1946 with comparisons

Year	Quantity	Year	Quantity
	<u>Head</u>		<u>Head</u>
1940	413,135	1944	308,233
1941	519,226	1945	425,023
1942	510,524	1946	432,447
1943	470,306		

U. S. Department of Agriculture, Bureau of Animal Industry.

AUSTRALIA REVIEWS POLICY ON HOG CASINGS

The Australian Government has directed the Commonwealth Tariff Board to investigate all matters relating to the distribution of hog casings, including the need for importation from the United States. Hearings will be held at Melbourne on February 3 and at Sydney on March 11. The inquiry will seek to determine the adequacy of supplies of hog casings, both imported and domestic, and will look into the activities of the Hog Casing Distributor's Association. Should there be justification for increasing the value of import licenses issued for such products, the allocation of the increase to established importers or to new firms will be discussed.

United States exports of hog casings to Australia averaged slightly over 1 million pounds annually in 1935-39, but varied widely in the war years. For the first 11 months of 1946 these exports totaled 418,117 pounds.

CUBAN LIVESTOCK AND MEAT SUPPLIES LOW

Cuba's livestock-and-meat-supply has not improved during the past 12 months. Although Cuban cattle are in better physical conditions than they were at this time a year ago, as a result of more abundant rainfall and greater supply of range grass, the present strong demand for meat and livestock products exceeds supply.

Slaughterings are reported to be running higher than a year ago, and total cattle numbers probably continued to decline. The Government has maintained price control on cattle and meat in theory, but apparently only limited efforts have been made to enforce price regulations.

Exportation of live animals and meat continues to be prohibited. Imports have consisted chiefly of lard and salt pork from the United States, but the quantities received are considered inadequate by the Cubans.'

The Cuban Cabinet sometime ago approved a 3-million-dollar program of general agricultural development, of which 1 million dollars are to be devoted to the livestock industry. For basic information on the Cuban livestock industry see "Cuba's Livestock and Meat Industries," Foreign Agriculture Circular FLM 1-46, July 1946.

CUBA TIGHTENS BEEF MARKETING CONTROLS

Cuba has established drastic controls over marketing of beef under a resolution of the Ministry of Commerce of December 11, 1946. To force beef into trade channels at official ceiling prices, the Government is establishing an elaborate system of marketing and slaughter quotas and licensing regulations which will control movement of both cattle and meat. The measure has aroused opposition among cattle-owners and business interests, but meets with the approval of labor groups. Informed sources offer little encouragement that new measures can be expected to alleviate to any marked degree Cuba's seasonal shortage of beef.

Beef is to be rationed to consumers on the basis of lists of habitual clients prepared by the local butchers. This system of rationing was originally used in the distribution of soap and in the sale of some Government-controlled stocks. This will be the first time, however, that an attempt has been made to ration beef on this basis. Ceiling prices continue unchanged at 8 cents a pound for live cattle, 32 cents a kilogram (14.5 cents per pound) for carcasses, 24 cents a pound retail for first-grade beef, 20 cents for second-grade beef, and 6 cents a pound for third-grade beef.

MEDITERRANEAN BASIN OLIVE-OIL OUTPUT

(Continued from page 45)

substantially from early season prospects. Most countries reported better average quality of oil and relatively little fly damage. Portugal, however, appears to have been the exception and reported the most serious fly damage and generally the lowest quality.

The export situation throughout the area is not as good as the increased output would indicate. Smaller production for the past two seasons coupled with the world-wide shortage of fats and oils, brought about by disrupted production during the war, left all countries except Greece without reserves. All other countries had difficulty in supplying their own requirements through the 1945-46 season. Estimates of the carry-over in Greece vary considerably but are not thought to have exceeded 5,000 tons of oil of suitable grade and quality to meet most import requirements abroad. Because of the short crop, prices of oil in all countries were reported to

be higher than normal during the season just closed. Black-market operations in oil were fairly general throughout the Mediterranean Basin.

At present it appears that Spain and perhaps Greece are the only countries that are likely to be in a position to export edible olive oil during the 1946-47 season. Certain other countries may see fit during the season to export limited quantities for the purpose of obtaining foreign exchange. If such exports are made, importation of a similar quantity of other edible oil will likely be required. It appears highly improbable at this time that United States imports of edible olive oil will approach prewar levels.

This is one of a series of regularly scheduled reports on world agricultural prospects approved by the Office of Foreign Agricultural Relations Committee on Foreign Crops and Livestock Statistics. For this report the Committee was composed of J. A. Becker, Chairman, W. R. Schreiber, C. M. Purves, Lois Bacon, and Robert Manovil.

COTTON AND OTHER FIBERS (Con't)

WEEKLY COTTON PRICES ON FOREIGN MARKETS

COTTON: Spot prices of certain foreign growths
and qualities in specific markets

Market location, kind, and quality	Date 1947	Unit of weight	Unit of currency	Price in: foreign currency	Equivalent U.S. cents per pound
Alexandria		Kantar			
Ashmouni, Good	1-16	99.05 lbs.	Tallari	45.00	37.53
Ashmouni, F.G.F.	1-16	99.05 lbs.	Tallari	41.25	34.40
Giza 7, Good	1-16	99.05 lbs.	Tallari	43.50	36.28
Karnak, Good	1-16	99.05 lbs.	Tallari	43.00	35.86
Karnak, F.G.F.	1-16	99.05 lbs.	Tallari	41.00	34.19
Bombay		Candy			
Jarila, Fine	1-16	784 lbs.	Rupee	444.00	17.08
Broach, Fine	1-16	784 lbs.	Rupee	556.00	21.39
Sind American, Fine	1-16	784 lbs.	Rupee	570.00	21.93
Punjab " , 289-F, Fine	1-16	784 lbs.	Rupee	635.00	24.43
Kampala, East African	1-16	784 lbs.	Rupee	850.00	32.70
Buenos Aires		Metric ton			
Type B	1-18	2204.6 lbs.	Peso	2110.00	28.50
Lima		Sp. Quintal			
Tanguis, Type 5	1-18	101.4 lbs.	Sol	158.00	23.97
Pima, Type 1 (Nominal)	1-18	101.4 lbs.	Sol	186.00	28.22
Recife		Arroba			
Mata, Type 5	1-17	33.07 lbs.	Cruzeiro	125.00	20.56
Sertao, Type 5	1-17	33.07 lbs.	Cruzeiro	130.00	21.39
Sao Paulo		Arroba			
Sao Paulo, Type 5	1-17	33.07 lbs.	Cruzeiro	148.50	24.43
Torreón		Sp. Quintal			
Middling, 15/16"	1-17	101.4 lbs.	Peso	142.00	28.82

Compiled from weekly cables from representatives abroad.

U. K. IMPORTS OF
DAIRY PRODUCTS

The following table continues a series designed to show quantities and country of origin of manufactured dairy products imported by the United Kingdom.

UNITED KINGDOM: Imports of manufactured dairy products
First 8 months 1946, with comparisons

Product and country of origin	First 8 months of			First 8 months 1946/38
	1938	1945	1946	
	: 1,000 pounds:	: 1,000 pounds:	: 1,000 pounds:	Percent
Butter				
New Zealand	193,555	214,180	183,036	97
Denmark	176,572	33,376	68,105	39
Australia	134,236	76,979	117,096	87
Netherlands	53,156	0	0	-
Eire (Ireland)	24,386	0	0	-
Sweden	22,457	0	0	-
Argentina	6,711	1,375	487	7
Canada	2,241	1	5	-
Other countries ...	97,357	71	54	-
Total	710,671	325,982	373,783	53
Cheese				
New Zealand	122,409	161,797	161,158	132
Canada	50,604	59,929	58,102	115
Australia	17,717	6,815	30,232	171
Netherlands	15,118	0	0	-
United States	a/	67,761	71,619	-
Other countries ...	12,726	54	5,365	42
Total	218,574	296,356	326,476	149
Condensed milk,				
unsweetened b/				
Canada	13,387	5	16,190	121
United States	650	103,416	45,401	-
Other countries ...	9,581	4,404	1,931	20
Total	23,618	107,825	63,522	269
Dried milk				
unsweetened c/				
New Zealand	9,918	4,740	6,459	65
United States	4,145	43,123	35,414	854
Australia	3,250	1,524	2,338	73
Canada	1,301	238	356	27
Eire (Ireland)	839	2,118	1,635	195
Other countries ...	7,084	196	3	-
Total	26,537	d/ 51,939	46,255	174

Office of Foreign Agricultural Relations. Official sources.
a/ Less than 500 pounds. b/ Imports of both sweetened and unsweetened condensed milk (first 8 months of each year) were as follows: 1938, 122,017,000 pounds; 1945, 116,852,000 pounds; 1946, 70,672,000 pounds. c/ Includes both whole dried milk and skimmed dried milk. d/ Includes 112,000 pounds dried buttermilk and whey.

GRAINS, GRAIN PRODUCTS, AND FEEDS (Con't)

ARGENTINA CONFIRMS

GOOD WHEAT CROP

Wheat production in Argentina is now estimated at 221,342,000 bushels, or very little change from the first estimate. The second estimate had been expected to be lower than the first, reflecting unfavorable effects of the heavy rains which fell in December. Trade sources had been predicting a reduction of about 10 percent from the first estimate of 218,366,000 bushels.

The present estimate places this year's crop about 54 percent above the 1945 harvest. The bulk of the increase was reported for the Province of Buenos Aires and Cordoba. Those two ranking wheat Provinces were estimated to have accounted for about 60 million bushels of the increase, compared with the 1945 crop. Buenos Aires, Cordoba, and Santa Fe together produced about 90 percent of the country's total.

